Saskatchewan Music Industry Review
Stakeholder Consultation

Phase I: Small Group Discussions
Participant Feedback and Summary Themes

Prepared for:

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Introduction

In May 2006, Premier Lorne Calvert appointed MLA Joanne Crofford as Legislative Secretary of the Music Industry Review. As part of Phase I of this initiative, Saskatchewan based music industry leaders – musicians, industry representatives, venues, provincial organizations and other stakeholders – participated in eight small group discussions conducted in four cities in October and November 2006. This report summarizes the central themes emerging from these facilitated discussions.

The purpose of these discussions was to explore the state of the music industry and what is important to stakeholders for its future development, particularly given the major music events coming to Saskatchewan in 2007 and the momentum these events will create. The small group discussions were designed to gather data to inform interim recommendations which Legislative Secretary Crofford will present to the Premier and the Minister of Culture, Youth and Recreation (CYR) in November 2006. As well, the information will inform the design of research instruments to be used in the next phase of the examination.

Legislative Secretary Crofford desired an informal dialogue among stakeholders. While the purpose of discussions was not to reach consensus, in the themes presented below estimates of agreement or disagreement are noted where possible. Such notations are based on transcript analysis and facilitator observations.

Methodology

Small group discussions were selected as the method to gather data for Phase I of the examination because they are an effective way to target people or organizations that have specific interests, expertise or concerns about the industry. Facilitated small group discussions allow all participants to engage in an in-depth dialogue on industry issues. Drawing on different backgrounds and expertise, discussions emerge based on the interests of participants and their interactive dialogue is the data.

In early October, 2006 facilitators, Susan Nurse and Valda Dohlen, met with Legislative Secretary Crofford and Heather Ritenburg, CYR Policy Analyst, to review background to the industry review, including goals of the Phase I research and an initial series of questions.

Using this information, the facilitators drafted a question guide to focus the discussions at each small group session. This guide was developed in consultation with the department and had their input and approval before the first session (see Appendix A). The main topics of the question guide were:

- state of the music industry in Saskatchewan
- 2007 musical events in the province
- impact of technology on the industry
- fostering growth in the industry through taxation incentives
- envisioning a vibrant music industry in the future

In total eight discussion groups were held:

- three in Regina
- three in Saskatoon
- one in Prince Albert
- one in Moose Jaw

Each small group discussion had the following structure:

- The facilitators welcomed participants and explained:
  - roles of facilitators, observers* and participants
  - introduction of observers
  - conduct guidelines for the discussions

* **Observers:** Legislative Secretary Joanne Crofford attended every small group discussion. Heather Ritenburg, CYR Policy Analyst attended Regina, Saskatoon and Moose Jaw sessions. Linda Paidel, CYR Communications Consultant attended two Saskatoon sessions and the Prince Albert and Moose Jaw sessions to assist with media coverage. Dawn Martin, Executive Director, Culture and Heritage Branch, CYR, attended the Prince Albert session.

- Legislative Secretary Crofford gave a brief presentation to the participants covering the following:
  - welcome and background;
  - purpose of the small group discussions; and
  - review of the consultation strategy as a whole.
- This was followed by a round of introductions. Participants were asked to give their name and their organization (if applicable) and to share one positive highlight of their experience in the Saskatchewan music industry.
- Facilitators then initiated and guided the group discussion using the question guide.
- Each group discussion was closed with a round asking participants to identify one short term recommendation.
- Exit cards were distributed at the end of each session, providing participants with an opportunity to identify priorities from the discussions and potential research topics and informants for Phase II. This information was gathered to supplement the discussions and is available in Appendix B.
- Participants were also invited to contribute any further reflections on the topics explored directly to Legislative Crofford via email.

Sample

Working from a list of industry "leaders," Saskatchewan Culture Youth and Recreation maintained responsibility for selecting and inviting participants to the small group discussions in each location. Participants were chosen primarily for their background and experience. They were from all areas of the music industry including musicians, promoters, technicians, venue operators, festival organizers, recording studios, media outlets, and non-profit organizations.

In total, 87 industry representatives participated in the small group discussions. Most groups had a representatives mixture of participants based on industry role, experience, age and gender. Two groups (Saskatoon afternoon and Prince Albert) had all male participants. Aboriginal industry leaders attended meetings in Saskatoon and Prince Albert.

The following is a breakdown of participant numbers:

Session One: Regina afternoon - 11
Session Two: Regina evening - 8
Session Three: Regina morning - 10
Session Four: Saskatoon evening - 13
Session Five: Saskatoon morning - 14
Session six: Saskatoon afternoon - 8
Session Seven: Prince Albert afternoon - 11
Session Eight: Moose Jaw morning - 12

Results

QUESTION #1: *What's Working Well?*

To build a vision for the future of the Saskatchewan Music Industry, it's important to examine where we are today. Thinking of the industry as a whole, what's working well in Saskatchewan?

Feedback

Considering the role of government, provincial organizations, and the private sector, participants were asked to share their thoughts on what's working well in the province and what challenges the industry faces. The following four themes emerged in the majority of group discussions:

1. Abundance of talent - lack of professional support

Most participants agreed that Saskatchewan is home to many talented, creative musicians. It was noted in every group however, that what is lacking is the corresponding industry structure to support them, including managers, agents, labels, publicists, distributors. The art is there. The business framework required for an industry to flourish is missing. Several groups added that the training opportunities to fill this void are also missing and that mentoring can and should play an

> *"The content creation is working well. There's no shortage of talent and people writing great songs. That works well; it stops about there....there's no infrastructure. I mean, how many times have we seen guys, great players, who get a recording, and because, and because they don't have the infrastructure to do anything with it, they end up with a thousand discs sitting in their garage or they move to Toronto?"*

2. Touring and live performance – lack of venues

It was generally agreed that touring and performing live is an important and effective means for artists to hone their talents. It also builds an "appetite" for live music throughout the province, and, as such, helps to build a culture that appreciates the music industry in general.

While discussing the benefits of touring, almost every group noted the lack of venues and opportunities to tour. Although festivals were sited as important showcasing opportunities, it was generally felt that more could be done to build the industry with new venues. It was also noted that provincial touring poses an economic challenge for both artists and communities, and financial support is important to ensure it thrives.

> *"And I don't know if you remember, like, the '70s the '80s, I mean, you know, we were all playing in rural Saskatchewan, there was all kinds of town hall dances and stuff going on, and now there is just nothing."*

3. SaskMusic and other provincial organizations

Almost every group identified the important role SaskMusic plays in the development of the industry in Saskatchewan. It was generally agreed that SaskMusic provides an invaluable service to the industry through workshops, grants, information, networking opportunities and individual support. Other agencies were mentioned, including Organization of Saskatchewan Arts Councils, Saskatchewan Arts Board, the Saskatchewan Country Music Association, the Saskatoon Jazz Society, the Saskatoon Blues Society and the Saskatoon Musician's Association.

> *"I just think it's great to have somebody to refer new artists to. When people call our office, I don't have time to spend the whole day developing them or answering their questions, so I always refer them to [SaskMusic] and tell them to buy a membership right away, get their newsletters, plug in to their events or conferences, their training, and it's great. I have accessed their funding, and I just think they do a great job."*

Concerns about provincial organization services focused on the lack of awareness among young, emerging artists of the support and financial opportunities available to them. As well, there was general agreement in Prince Albert that the focus of these agencies needs to expand beyond the larger centres of Saskatoon and Regina. Finally, while provincial organizations were commended for supporting the careers of emerging artists, it was noted that the resources artists need to get to the "next level" are missing.

4. Collaboration

The majority of groups discussed the success of collaborative efforts among the groups and agencies that make up the music community. By working together, the industry develops a sense of community and cohesiveness which makes their voice stronger and more effective. Whether it is festival planning or lobbying government, the ability to work together has proven most successful.

> *"When the community works together, there's a synergy that's unstoppable."*

QUESTION #2: *Music Events of 2007*

Saskatchewan will host several major music events in 2007, which will provide a unique opportunity to build momentum in the industry. What can we do, as a music community, to best take advantage of this opportunity?

Feedback

Participants in every group recognized that the musical events taking place in 2007 will provide important opportunities to showcase Saskatchewan talent and ultimately build industry momentum in the province. There was general agreement that these events will serve to build enthusiasm for the industry among Saskatchewan residents and further build Saskatchewan music audiences. Many also agreed that the short term strategy to capitalize on these opportunities must include a long term vision that continues beyond 2007.

This support for the promise of 2007 was qualified with the following concerns. First, several participants identified the importance of ensuring local expertise – technical, promotional and organizational – is used for these events. Second, some participants in one group cautioned that these events may have a negative impact on the attendance at long-standing, existing events in the province, and financial support to offset this impact is important.

Three main themes developed during the discussions around 2007.

1. Showcasing

The opportunity to showcase Saskatchewan talent during the 2007 events was raised in every small group discussion on this topic. Participants identified the importance of ensuring local musicians received exposure during the events, and some participants discussed the importance of showcasing talent throughout the year as well.

The importance of and need for showcasing venues was consistently raised in this context. The lack of venues for live performance in the province is an ongoing concern for participants, and it was highlighted as a particular challenge for the special showcasing efforts that will need to take place to fully capitalize on events in 2007.

> *"We do not have a lot of high quality venues…but if we want our industry to increase, one of the basic premises is they have to have a place to play."*

2. Promotion

The need to actively publicize the events of 2007 and the role of local talent in those events was consistently identified throughout the group discussions. Many groups identified a need to maximize media coverage in all formats, including TV, radio, print and the internet. One group suggested a compilation CD of local artists to promote across Canada, and another group envisioned partnerships with retailers to highlight local talent during each event. Two groups raised the idea of partnering with tourism agencies to draw in national and international "music tourists." The importance of informing local stakeholders about showcasing and other opportunities these events will provide was also noted.

Some groups identified the limited media support that currently exists for local talent. This led to discussions about the need to put "grassroots" pressure on media to provide local talent with appropriate profiling. Ideas included SCN features on Saskatchewan talent throughout the year and industry spotlights through local print and radio media.

> *"I don't think Saskatchewan has a clue that all these events are coming....You know, if TV would put as much hype into this as they do over the Rolling Stones, you know, maybe there might actually be something going on."*

3. Readiness

Most groups expressed concerns about Saskatchewan performers' ability or readiness to take advantage of the opportunities that will present during the events in 2007. They identified the need to fund workshops or other educational sessions to provide advice on management, marketing, professional sound, and performance critiques. The need to ensure local talent has access to professional production services was also mentioned. Equipping artists with the skills, knowledge, technology and support they need to make the best of these events was a consistent theme.

> *"One of the things, now, that needs to be done in advance...is develop a...workshop...to enable our talent to actually make the most of these showcase opportunities. Whether that's...getting some advice on managing, on marketing, advice from somebody that knows about performance or their sound or whatever, just so that what they are presenting at these events is the best that they could possibly be."*

QUESTION #3: *Impact of Technology*

Many would suggest that, of all the cultural industries, the music industry has been most impacted by technology. How has technology impacted you?

Feedback:

Discussions on this topic covered technological advances in all areas of the music industry. Overall, there was a general opinion that technology is having a positive impact on the industry. The potential of the internet to strengthen the music community, locally and globally was recognized. Many participants were optimistic about the opportunities these changes present and were willing to work with the advances to build the success of their industry. While most participants voiced appreciation for the way technology has changed their work, every group had participants who voiced some apprehension.

The following two themes highlight what participants saw as the positive results of technology, as well as the concerns technological changes raise for the industry.

1. Production

Participants consistently described how access to inexpensive recording software has provided artists with the means to record and produce music on their own. In addition, some artists noted that technology is a means to collaborate with other industry experts around the world in the production of their music.

While any artist without the funds for a recording professional can now benefit from these changes, many participants who spoke to this point emphasized the new opportunities this has created for young, emerging artists.

While home recording technology was recognized as an unprecedented opportunity in the industry, many participants noted that there are limits to the sound and production quality of such recordings. Interestingly, this led some groups to point out that quality limits from home production technology has led to an increased value for professional recording. Having tried it themselves, "home-produced" artists come to learn the value the professional brings to the production process.

> *"...a lot of artists that wouldn't normally have ever gotten to the point of coming to see me at a $60 an hour recording studio because they have taken all these little steps at home and either have learned enough that they learned that there was a limited amount that they can do at home or they have decided, no, this isn't for me, and you know, quit or whatever, but it really hasn't slowed down the amount of people getting to the level of making a professional CD."*

As well, some participants recognized that technological advances in sound and recording have brought with them financial pressures for Saskatchewan's recording companies and some venues. Staying up to date on the latest technology is an expensive endeavor, but a necessary step in order to keep local artists and draw outside artists to the recording scene in Saskatchewan.

> *"You know the one thing about technology is that it would be nice if they kept – they supported – kept Saskatchewan support in Saskatchewan. Because a lot times when you go for technology, they will take it outside of Saskatchewan, they will source it at other places."*

2. Marketing and Promotion

Music is a medium well suited to mass electronic distribution, and it was repeatedly noted that the internet provides easy, inexpensive access to new global music markets. Many artists described marketing their CD's directly to consumers via their own websites or downloading sites. In most groups, an artist and/or promoter described how access to a global audience was important. For some this was particularly essential since local markets were not large enough to sustain their work in a particular niche.

In addition, talent buyers, presenters, and radio stations noted the value of the internet for accessing and reviewing local, national and international artists. Communication between performers and these venues is now easier and more cost effective, as artists' web pages now serve as the new 'promo' pack.

> *"Yes, my band just had a single out and we didn't press it to CD or anything. We went to a thing called DMDS, it's a service that goes right to radio programmers at all these country stations or rock, whatever. You can designate where it goes. We just did it that route and got a great response."*

In several groups, some artists expressed reservations about the learning demands new technologies present, for example, developing and maintaining a website and selling product online. Some lamented the time required to 'get up to speed' on technology, time they would rather use for creative work.

Maybe it's just my age showing here, but you know, I think there is a lot of us out there that, you know, really don't have a clue how to set up stuff like a secured website, you know, so that we can have our songs downloaded, and you know, I think there could be and probably should be some kind of educational component somewhere there for the musicians to...this is how you set up a website...or this is how you approach iTunes, or CD Baby or whoever it is....there is probably a lot of musicians out there that could use that kind of educational component.."

QUESTION #4: *Impact of Taxation*

Provincial tax policy can have a significant impact on industry development, for example, it can provide an incentive to develop more product or an incentive to sell more product. What would a Saskatchewan Music Industry Tax Program ideally do?

Feedback

Participants in every group expressed interest in some form of government incentives to support the development of the industry. Some participants were able to identify a specific tax initiative, including models from other jurisdictions and industries. Others who were unfamiliar with tax policy preferred to frame their input in terms of a desired outcome. Many participants noted the need to ensure that any government support is targeted to encourage the use of Saskatchewan talent.

While many ideas were discussed over the course of eight groups meetings, it is worth noting that two incentive ideas were discussed in all eight groups. These were incentives for rural touring opportunities and incentives to address the lack of venues in the province. In general, there was overwhelming agreement that these are important areas which could be addressed by the tax system.

Ideas for tax or incentive initiatives came under the following four themes:

1. **Live Music Incentives to:**
   - increase the number and diversity of venues
   - increase Saskatchewan touring opportunities
   - adequately compensate performers
   - offset venue costs
   - enhance existing festivals and other venues
   - increase Saskatchewan content in all venues

   Specific ideas included:
   - all age/non-licensed venues
   - school-based live performances
   - small town tours (Centennial model)
   - amend liquor laws to encourage more live performances i.e. liquor tax rebate, venue capacity

2. **Artist Incentives to:**
   - improve income levels
   - make touring and industry travel more affordable
   - reduce administrative work
   - develop careers to the "next level"
   - produce professional shows with local technical talent
   - increase educational/training opportunities with industry experts
   - demonstrate recognition for senior artists
   - provide music training opportunities for low income youth
   - encourage interest among youth in the arts

   Specific ideas included:
   - Tax exemption on artist income (Ireland model)
   - Write off music business expenses against paid-employment income
   - Wage sharing employee program (administrative assistance)
   - Grants for artists who have a proven indication of interest from a major label.
   - Summer School of the Arts model

3. **Industry Development Incentives to:**
   - address professional gaps
   - increase training and mentoring programs
   - increase public and private investment
   - increase employment opportunities
   - foster small business development
   - encourage collaboration with other industries
   - develop independent labels
   - offset recording and manufacturing costs

   Specific ideas included:
   - investment tax credit
   - employment tax credit (film industry model)
   - forgivable loans
   - public investment through a foundation, estate planning or endowment fund
   - film industry to use local musical talent
   - tax credit to offset costs of CD manufacturing
   - eliminate the PST for recordings

4. **Promotional Incentives to:**
   - raise the profile of Saskatchewan talent
   - increase Saskatchewan content on radio stations

   Specific ideas include:
   - well organized showcases at national and international music events (MRIA model)
   - connect industry executives and representatives to Saskatchewan talent

QUESTION #5: ***Envisioning the Future of the Industry***

Imagine, for a minute, it's the year 2011, and the Daily Chord is featuring Saskatchewan as a world renowned music place. As you picture it, what is it that makes Saskatchewan so successful – what does the industry look like?

Feedback

As groups discussed their vision of a strong, vibrant music industry in Saskatchewan eight themes emerged. The first three themes were discussed in all eight groups. The remaining five themes were explored in a majority of the groups. In addition, Appendix C lists successful industry models suggested for consideration in future research.

1. Saskatchewan people appreciate Saskatchewan music

In the future, people in Saskatchewan know about and appreciate the musical talent that lives here. Communities throughout the province are enthusiastic about Saskatchewan music, value live performances and financially support their artists. People all across the province listen to Saskatchewan music in their homes and on the radio. People are proud of their artists and the industry as a whole.

2. Saskatchewan is home to a thriving music scene

In the future, Saskatchewan is "the music place" - home to many artists who have "made it" on the national and international music scene. Saskatchewan artists are confident and proving themselves on stage. There is a recognizable Saskatchewan "sound" and a thriving community of professional talent representing the diversity all music genres. Business is booming, and musicians are well paid for their talents. Saskatchewan's success draws artists from all over the world, as a destination for world class performance and recording.

3. Collaboration and cooperation are hallmarks of the industry

In the future, collaboration plays a central role in how the industry works. Organizations are working together, and the industry is meeting as a community to share ideas. Performers have a place to gather and share ideas, success stories and advice. The industry is connected across all regions, and there is strong communication with the North and between all the urban centres. The music industry has close ties to all other cultural industries, as well as the business and sports communities. Film and sound have merged.

4. Saskatchewan is home to many live performance venues

In the future, there is an abundance of live, diverse venues in the province. Music is heard throughout the province in coffee houses, restaurants, bars, "soft seat" theaters, all age venues, non licensed establishments and diverse annual festivals. Small communities throughout the province are hosting live performances, and there is an established touring network.

5. Saskatchewan's schools engage youth in all aspects of music

In the future, school systems throughout the province expose kids to music of all genres. Schools give all kids the opportunity to experience live music and learn all kinds of instruments. There is a thriving music curriculum in every school, including a well-funded band program and a summer school for the arts. High schools expose kids to career opportunities and prepare them for future roles in the industry. Kids are provided with the technical equipment and mentoring relationships they need to learn about and become passionate about the industry.

6. Saskatchewan has a strong professional infrastructure

In the future, artists are supported and guided in the business of the industry by professionals based in the province - booking agents, producers, promoters, and recording professionals. These professionals, coupled with world class recording facilities, support local musicians and draw national and international artists to the province. Saskatchewan music is avidly promoted and marketed globally, with extra support for Saskatchewan talent at all major music events.

7. Saskatchewan is home to world-renowned training

In the future, there is a provincial training facility that offers multi-disciplinary training on all aspects of the industry – creative, technical and professional. Training includes exchange programs and mentoring to enhance the learning and draw on the experience of senior artists and outside professionals. This training is a critical component of the strategy to keep young people in the province and to draw people to the music scene in Saskatchewan. It provides employment opportunities and recognition for people in the industry.

8. The Government of Saskatchewan is recognized for its support of the music industry

In the future, government invests significantly in Saskatchewan's creative community, through stable budgets, tax relief and increased industry funding. Ideas for tax relief include tax exemptions for artists, recording tax credits, and radio tax credits for Saskatchewan content. Funding initiatives include grants for jamborees, local festivals and other presenters, non-taxable grants for artists, and funding to teach senior artists how to mentor. Government carefully considers how policy in other areas, such as Liquor and Gaming, affects the music industry. Government demonstrates pride in its music industry by including Saskatchewan music talent in trade missions to other regions or countries.

Wrap Up Question: *What if Anything Was Missed?*

What, if anything have we missed - was there something you came today wanting to talk about but it hasn't come up yet?

Group 1
- Community radio: what are things that should be done to help it thrive
- Consider the CKUA model

Group 2
- Concern about government's level of potential commitment - be bold or go home
- Have a vision for 2007 to ensure we put our "best foot forward" to build an industry

Group 3
- 2007 initiatives need to be planned with the input of industry representatives
- Ensure we showcase Saskatchewan artists throughout the 2007 events

Group 4
- Should consider incentives for business community to use local talent to produce and perform for their events.
- Important that the business community recognizes the role the music industry plays for them

Group 5
- Importance of making connections: i.e. sports and cultural connections
- Include the entire cultural community

Group 6
- Sustainable funding for organizations on a 5 year plan

Group 7
- Creativity: fostering the development of songwriters

Group 8
- Don't omit jazz, classical and gospel music from the 2007 live performance showcases

Final Round: *Greatest Impact in the Short Term*

In one sentence, what's the one thing government could do that would have the greatest impact on the development of Saskatchewan's music industry in the short term?

Feedback

The purpose of the question was to provide participants with the opportunity to close the discussion with a final thought on a specific action item that the government could initiate in the short term. Each participant answered ir.dividually in a round format. Four themes emerged from these rounds: funding, education, incentives, and promotion. As well, there were several suggestions which fell outside of these themes and they have been classified as "general" suggestions below. The priorities of each theme are highlighted below along with a list of specific responses and the number of times each was mentioned.

1. Funding

Funding initiatives were mentioned 30 times during the final round. Within this theme, participants placed a priority on increased support for existing events or programs, in particular SaskMusic and music programming in the school system. As well, there was support for targeted funding to fill the professional gaps in the industry infrastructure.

1. Funding program to help develop professional gap in industry infrastructure – producers, recording companies, agents, managers, etc. (7)
2. Increase current funding for existing events or programs (5)
3. Increased funding to SaskMusic (4)
4. More money to music programming in schools (2)
5. Provide recording and manufacturing grants (3)
6. Increase financial support to artists for touring, recording and operating costs – i.e. small business loans (2)
7. Infuse money into the industry before 2007 events (2)
8. Support for more and different festivals (1)
9. Support for artist hubs (1)
10. When "big acts" come to Saskatchewan, collect funds from them to invest in the development of Saskatchewan's music industry (1)
11. Require commercial media to fund industry development (1)
12. Better provincial representation on committees that distribute grant money (1)

2. Education and Professional Development

In total, education initiatives were mentioned 20 times in the final round. The need to educate young people about career opportunities in the music industry was a high priority, and typically this was discussed in the context of attracting or keeping our youth in Saskatchewan. As well, participants placed an emphasis on the need to educate artists about the business side of the industry.

13. Educate students about the opportunities in the industry (6)
14. Educate artists about the business side of the industry – how the industry works (3)
15. Establish industry training in Saskatchewan (2)
16. Establish a mentoring program (2)
17. Educate and increase awareness among artists about existing grant opportunities (2)
18. Provide teachers with the technical and financial means they need to teach students about music industry (1)
19. Music scholarships (1)
20. Establish a summer arts school (1)
21. Fund feasibility study on school of arts (1)
22. Cultural exchange program for musicians (1)

3. Promotion and Marketing

In total, promotion initiatives were mentioned 20 times in the final round. Several participants emphasized the importance of funding publicity and showcasing opportunities for the events of 2007. Most other comments related to the more general need to raise the profile of Saskatchewan talent among the Saskatchewan population in order to build strong, local audiences.

23. Fund publicity and showcasing events during 2007 (4)
24. Educate the public about Sask. artists (2)
25. Fund SCN and other local media to profile Saskatchewan artists, including live performances (3)
26. Incentives for radio to broaden their play list to include more Sask content (2)
27. Mandate government initiatives to use Sask. musical talent – i.e. in government ads or at government meetings (2)
28. Put together a touring show of Saskatchewan artists (1)
29. Fund community radio (1)
30. Take a leadership role in motivating people to feel proud about Saskatchewan and the music industry (2)
31. Help artists promote through the internet to a global market – a Saskatchewan music website for local bands (1)
32. Marketing Saskatchewan talent at music events (1)
33. Pressure CRTC to require new Canadian music as part of Canadian content rules (1)

4. Incentives

Tax incentives were mentioned 17 times in the final round. Almost half of these responses related to incentives to increase live venue opportunities in the province.

34. Incentives to increase opportunities for live music – more venues to hire Saskatchewan artists and pay them well (8)
35. Investment subsidy – breaks to corporations or investors to make the investment in industry (2)
36. Give musical artists the same tax incentives as any other small business – give the arts a platform that's equal to other industries (2)
37. Tax exemption for Saskatchewan artists income (2)
38. Tax break to write off music business expenses against paid-employment income (1)
39. Incentive to help musicians hire an employee (1)
40. Remove the PST from recording (1)

5. General

41. Continue dialogue with industry and get their input into programs (1)
42. Consolidation of organizations (2)
43. Listen to and be more aware of Saskatchewan music (3)
44. Pass Status of the Artist legislation (2)

Exit Cards: *Priorities and Phase II Research*

At the end of each small group discussion, participants were asked to complete an exit card with two questions asking them to identify priorities and phase II research. Completing this card was voluntary.

SIDE 1: Priorities

In total, there were 133 responses to this question. Because many of the participants provided more than one response on their exit card, the total number of responses exceeds the number of participants.

When asked to name the most important aspect of the group discussion, twelve topics emerged.

1. The need for government funding and tax incentives to develop the industry (25)
2. The value of promoting Saskatchewan's music industry both locally and nationally (22)
3. The value of arts education in fostering the interest and potential among youth (18)
4. The need to develop a professional infrastructure to support and sustain the industry (17)
5. The potential to strengthen the role of NGO's through consolidation and/or increased funding (10)
6. The impact of 2007 events for the industry (7)
7. The need for a long term industry development strategy (5)
8. The importance of live performance opportunities (5)
9. The value of consultation with industry stakeholders (4)
10. The value of collaboration and communication among industry stakeholders (4)
11. The potential to use corporate funding to bolster the industry (4)
12. The marketing potential from new technology (2)
13. Other (10)

For a complete listing of responses by topic, see Appendix B

SIDE 2: Phase II Research

In total there were 61 responses to this question. Because some participants did not complete this question, there are fewer total responses than participant numbers.

When asked to identify topics to be explored in Phase II, participant responses fell into one of the following categories:

1. Investigate the role that education and the school system can play in music industry career development (13)
2. Examine ways to raise the industry profile and cultivate audiences, including the role of local media. (12)
3. Research how to build and expand the industry's professional infrastructure (10)
4. Evaluate the need for more live performance venues for Saskatchewan talent (6)
5. Investigate ways to subsidize the industry and encourage corporate investment (6)
6. Research how NGO's can best contribute to the development of the industry (5)
7. Develop a long term strategy for the industry (4)
8. Other (5)

For a complete listing of responses by topic, see Appendix B

Conclusion

In conclusion, the small group discussions were a successful means of gathering important information from industry stakeholders for the first phase of the Music Industry Review. Input was thoughtful, and the dialogue was rich. There was a general mood of optimism and encouragement, reflecting a belief in the potential of the industry to develop and thrive.

There was particular enthusiasm for the opportunities 2007 will bring. Participants were hopeful that the music industry – private sector, government and NGO's – would work together to take advantage of this unique opportunity to move the industry forward. There was confidence that, with collaboration, support and a strong commitment from government, Saskatchewan will become a major music destination.

> *"...that's why these events in the next ten months are so important, because hopefully one of the legacies of them will be that our own population realizes how big this really is and how valuable this could be....Hopefully, and if we do it right...we have the greatest musical marketing hooks that any province has ever had..."*

Although the purpose of the group discussions was to inform government's direction, it is worth noting that stakeholders recognized a significant value in the discussions for themselves. Many participants appreciated the opportunity to meet with their industry colleagues, and this was reflected in a strong level of engagement at every session.

> *"The most valuable aspect of the session was the opportunity for the dialogue itself, which was FANTASTIC, and needs to continue."*

> *"I was impressed with the questions and who was in attendance – great meeting."*

Appendices

Appendix A: Question Guide

Saskatchewan Music Industry Examination
Culture, Youth and Recreation

Guiding Questions:

1. To build a vision for the future of the Saskatchewan Music Industry, it's important to examine where we are today. Thinking of the industry as a whole, what's working well in Saskatchewan?

   What's not working well – what challenges do you face?

2. Saskatchewan will host several major music events in 2007, which will provide a unique opportunity to build momentum in the industry. What can we do, as a music community, to best take advantage of this opportunity?

   What is the role of government in supporting this opportunity?

3. Many would suggest that, of all the cultural industries, the music industry has been most impacted by technology. How has technology impacted you?

   How do you think it will affect you in the future? What is the government's role in this changing environment?

4. Provincial tax policy can have a significant impact on industry development, for example, it can provide an incentive to develop more product or an incentive to sell more product.

   What would a Saskatchewan Music Industry Tax Program ideally do?

5. Imagine, for a minute, it's the year 2011, and the Daily Chord is featuring Saskatchewan as a world renowned music place. As you picture it, what is it that makes Saskatchewan so successful - what does the industry look like?

   Think of a vibrant music industry outside of Saskatchewan. What makes their approach successful - what can we learn from them?

Wrap Up Question:

What, if anything have we missed - was there something you came today wanting to talk about but it hasn't come up yet?

Final Round Question:

In one sentence, what's the one thing government could do that would have the greatest impact on the development of Saskatchewan's music industry in the short term?

Appendix B: Exit Cards

SIDE 1: Of all the things we discussed today, what to you is the most important?

Responses by Topic

FUNDING AND TAX INCENTIVES

1. Subsidy mechanism for presenters to receive support for hiring Saskatchewan resident musicians
2. Ensuring we don't lose funding
3. Investment opportunities
4. Tax and investment opportunities
5. Funding for artists
6. Ongoing sustainable financial support/investment
7. To impress upon the government the notion that it is to Saskatchewan's advantage as a whole to have a thriving music community. Create financial and practical incentives for performers to work and create here.
8. Increase grants and loans for the entire music industry.
9. Directing government funds/subsidies to Sk. musicians, especially at the grassroots level of creating opportunities for emerging musicians in eating/drinking establishments.
10. Sustainable funding
11. Funding for individuals, corporate business, communities.
12. Funding help for artists
13. Promotion of sustainable careers that are long term – through funding at sliding scale for multi-industry
14. The strategy to help grow and sustain re: music industry in Saskatchewan must take into account the needs of established artists. It's hard to maintain and grow a career without the finances to support yourself.
15. Admin support for artists.
16. Funding for the year of the Creative Artist
17. Funding is important
18. Funding is important
19. Grants
20. If festivals are applying for money, they should be encouraged to hire more Sk. talent.
21. Eliminate the PST on cultural industry
22. Tax incentives to encourage venues to hire music.
23. Tax incentives to radio if they play a certain percentage of Sk. content.
24. Tax exemption for musicians. Money provides to help hire a secretary
25. Make it profitable to choose music as a career in Sk. tax incentives, E.I., pension plan

PROMOTION

1. Education to ourselves (people of Sask) about what's available (Sk. Musicians) to instill pride
2. Sask. Festival at major events, exhibition like WCMA's, Juno's etc.
3. Realizing the value of music, educating non-industry people about the importance of music
4. Creating a stronger presence on the national scene (i.e. subsidies).
5. Creating methods of marketing Sk artists on a national level, especially tv

6. Recognizing music and arts as a priority for keeping people in Saskatchewan and attracting more people, almost like parks or art galleries.
7. Local promotion
8. Development of grassroots appreciation for the arts.
9. Proper marketing
10. Promote the development of Sask. Music Industry to becoming a world exporter of music by year 2011.
11. Radio air play, getting Saskatchewan artists time on radio so that people will get a chance to get their music heard.
12. Marketing and promotion (perception vs. promotion).
13. Assist community radio to stream their signal on their internet
14. Funding for community radio.
15. The need for recognition of the intrinsic value of the arts in Saskatchewan. That through marketing and promotion, Saskatchewan artists can be valued locally, provincially, nationally.
16. Provincial passion for the entire industry. Be excited about what this province has to offer and where it is heading. If the government shows a positive attitude for the industry, and assists in some capacity, it will rub off and excite those in the province.
17. Promoting how talented Sask. Artists are
18. Audience development and retention.
19. Recognition and promotion
20. Promotion and the info on the music industry and the updates
21. Information
22. Seeing program ideas come forward that could create something towards building culture in our community

EDUCATION

1. School of the arts, year round, multi-disciplinary
2. Education
3. Education relating to this creative industry is sorely missing in this province at the institutional level – high school and post-secondary level.
4. The area of mentorship – developing the younger artist
5. Keeping music and arts in schools.
6. Long term education
7. Childhood music education
8. Education
9. Education!
10. Cultivating the arts within the province through education and making being an artist more convenient, which will blossom and be good for all in and tied to Saskatchewan.
11. Music education
12. School of the arts, year round, multi-disciplinary
13. Education and mentorship
14. Education is important
15. Education is important
16. Education
17. The value of arts education. How it can generate interest in all levels of the arts.
18. Saskatchewan as a music destination with renowned expertise in all facets of the industry (like Nashville, Motown etc) that could include an education aspect as a school or program that is music specific.

PROFESSIONAL INFRASTRUCTURE

1. Support for artist manager training/education
2. Developed management available to a wide area of the industry including young start-up groups
3. Training programs
4. Marketing and professional development
5. Development of production and marketing programs
6. Train and retain young people in the music industry.
7. Creating a stronger infrastructure here in Saskatchewan to help show the world our world-class Saskatchewan talent.
8. Develop the infrastructure to enable Sk. artists to be exposed to the idea of music as a career, developing their talents, and having the tools to emerge nationally and internationally.
9. Developing the strategies and supports for our Sk. talent to take the next steps to build their careers (market access, education etc).
10. Start up funding for music industry professionals
11. Create an office to support artists with management start-up advice and mentorship/career development;
12. If you build the infrastructure, they will stay and they will come. Professional development/training and mentorship for youth - in particular, those who could play a significant role in developing the business side of the industry (artist managers, concert promoters etc).
13. Saskatchewan needs more management and industry experts to help young talent.
14. Seeing the big picture of the industry – confirming there are 2 levels in the industry – big business and artists
15. Corporate investment and support to industry to develop this industry infrastructure
16. Start-up loans and grants for companies who want to build infrastructure (i.e. management companies and indie labels).
17. Funding for mentorship in the recording industry

PROVINCIAL ORGANIZATIONS

1. Consolidation of existing support and subsequent significant increase in that support
2. Also one umbrella organization
3. One voice (government)
4. Artist/community interaction – supporting organizations like that promote the industry and provide services.
5. Long term: government policy change to restructure funding for art and entertainment (music) into one central department
6. Sask. Film and Sound Organization:

a. responsible for education (schools and artists) and umbrella promotion organization
b. incentives for gigs – bars, soft seaters, schools
c. education resource centre – out of province promotion and within province promotion (small town gigs etc).

7. The need for an umbrella organization, a co-op that would service artists to help them develop marketing strategies and promotion skills.
8. Increased funding and mandate for SRIA (SaskMusic) so Sask. Artists can go out and collect tax dollars. Promotion of the Sask. Music in and outside of Sask.
9. Funding organizations, mainly non-profits, who are really doing something to elevate and promote Saskatchewan talent. Burnout
10. Letting Saskatchewan artists know what grants help etc is available to them. The more information they can obtain the better.

2007

1. Put together a cohesive campaign to generate a province-wide buzz for the three industry award shows. Advertising, promotions, opportunities for performance, highlight the participating Sk. Artists. Bring the people that are around the table to have input.
2. Sustaining positive hype that will be created in 2007 with the Juno's and CMA Awards.
3. Take ownership of our successes...the reason why the Juno's are coming to Saskatoon. Sustain the legacy of the Juno's.
4. Short term: government support to music industry labels, artists, venues etc in preparation to take advantage of 4 major music events in 2007.
5. Creating momentum from the 4 events in 2007
6. Don't squash long events with the 2007 events
7. Making sure large events don't squash existing music industry. The Rolling Stones and last WCMA's both devastated a month worth of small concerts in every venue in Regina.

LONG TERM STRATEGY

1. A long term cultural strategy followed up with appropriate resources
2. Long term stability with an investment component
3. A well articulated vision with a short and long term plan that is very adequately resourced.
4. Long-term strategy for music industry in Saskatchewan.
5. Strategy (long term) valuing all the arts

LIVE ENTERTAINMENT

1. Ensuring live entertainment continues to exist
2. Live performance industry must continue to grow
3. Live venues
4. Opportunities and venues
5. Children - young excitement for live music

CONSULTATION

1. Spend more time with industry professionals: Ross Nykfonk, Jim Hodges, Bert McKay, Rob Bryonton. CON OR OTHER
2. Open discussion between peers to better the cultural experience of Saskatchewan as a benefit to our community...as well as a cultural export. CON OR PROCESS
3. You listened. There's hope.
4. The most valuable aspect of the session was the opportunity for the dialogue itself, which was FANTASTIC, and needs to continue.

COLLABORATION

1. Establishing a better based community to grow better contacts within the industry so as to have a broader base of knowledge and experience
2. More communication across the province
3. There is a serious, maybe urgent, need for cooperation between all the institutional players in the music industry.
4. Funding supports for non-profits and cooperation and working together.

CORPORATE FUNDING

1. Creating a living in the industry without having to hold down 1 or 2 jobs.
2. Corporate funding (i.e. radio profits funding portion of the arts).
3. Radio and TV funding of music – the biggest users should pay to develop new artists and help fund new recordings.
4. The need for legislation that requires media outlets in the province to re-direct some of their profits toward the arts in the province.

TECHNOLOGY

1. Internet distribution of Saskatchewan artists
2. How can Saskatchewan Musicians access worldwide markets using the participatory "Web 2.0" model?

OTHER

1. Revisit the CIDS recommendations
2. Real programs to help musicians, not the Junos, Rolling Stones or WCMA.
3. Industry development and recognition
4. Ways to stimulate growth and development in the industry: forgivable loans, creative arts programs in schools, tax measures.
5. Outdated Canadian Content rules – classic Canadian rock should not be considered Canadian content
6. I liked the idea about where the industry will be in 2011
7. Finding artists projects in their time of need
8. Priorities of "business" defines what to do.
9. Nurturing and supportive atmosphere
10. Keeping the people being creative is important.

SIDE 2: Question #2: In addition to what was discussed today, what, if any, topics do you think should be explored in the second phase of this examination of the music industry? Who would be a good resource on this topic?

Responses by Topic

EDUCATION AND SCHOOL SYSTEM

1. Educational gap
2. Implementing the industry in schools
3. Find a way to get music creation and production into the school system. Maybe we need to create the Saskatchewan School of Rock.
4. Getting people interested in the music industry as a career, not only as a performer, but as a manager, promoter etc.
5. Education of our young people is key – important to get started asap
6. Get a sense from the youth as to what kind of mentorship they would benefit from.
7. Adding more opportunities for children to learn about and experience the arts in school. If by having to do drama, for example, and everyone being exposed, this may even have children no so exploited to bullying if they wish to act, sing etc.

8. Music education in the schools. Guidance counselors should be able to direct students into full-time employment in this industry.
9. Education in schools on doing music for a living
10. Elementary and high school music curricula.
11. The creation of a multi-disciplinary arts school.
12. Performing Arts School
13. Youth grants, education, they are the future

PROMOTIONS AND SUPPORT

1. Support for exporting of Saskatchewan music to worldwide market - creating a strong front; showcasing and supporting artists and industry professionals at events like SXSW, MIDEM, Popkomm, etc.
2. How can government make the arts a high profile and viable industry.
3. Public respect of artists and the music industry
4. Supporting the local musicians
5. Reaching out to community (non-musicians/audience)
6. Widely accessible artist support.
7. Promotion of local talent.
8. Role of local media
9. The development of an ongoing media music showcase for Saskatchewan talent which reaches both inside and outside the province.
10. Airing of Saskatchewan music videos on SCN and Sasktel Max
11. Content of emerging Canadian artists on the radio
12. The lack of support for Sask. artists from the mainstream media

DEVELOPMENT OF INFRASTRUCTURE

1. A long term plan for training the next generation of management artistry and support people, technicians etc.
2. How to build a better management and promotional infrastructure.
3. Promoters; talent buyers; management
4. Expanding existing infrastructure within the industry i.e. management, recording facilities, employment
5. Talent scouting
6. Music distribution
7. In depth recruitment of creative talent to become residents of Saskatchewan. Kevin and Cory Churko.
8. Labels of Saskatchewan
9. Business model
10. Look at the infrastructure of the industry beyond the artists (managers, agents etc.)

LIVE ENTERTAINMENT OPPORTUNITIES

1. Venues
2. Venues for artists
3. I'd like to hear the point of view of local business i.e. clubs and other with respect to live music and the view of radio.

4. More live music venues throughout the province that focus on Sask. acts (OSAC). Why are local arts groups not hiring Saskatchewan Acts? There's money?
5. Getting Saskatchewan artists out to the smaller venues – keeping the music in front of the people.
6. Do we really need more venues?

FUNDING AND INCENTIVES

1. How to co-ordinate funding and future opportunities with the major players in the commercial music industry in Canada.
2. Direct investment in artists or music based facilities by corporations for tax credits
3. Video grants to make videos
4. The music industry does need to be subsidized
5. Business development incentives. I would love to start a business but have to pay the bills.
6. In order to grow the musical economy, we must take the measures to make it profitable to choose music as a career. Once that is done, the rest will take care of itself. When people have financial security, it becomes a lot easier to be creative.

PROVINCIAL ORGANIZATIONS

1. Low-hanging fruit – identifying specific projects or organizations that could best be utilized to create new opportunities almost immediately – like the proposed Artist Business Centre and [SaskMusic's] existing programs.
2. Consolidation of all concerned parties into one voice
3. The agencies with defined roles need to come together with government to review and plan from what is heard in these sessions
4. Increased support for granting agencies such as Saskatchewan Arts Board
5. I feel people need to be made aware of what funding locally and nationally there is available through government programs

LONG TERM STRATEGIES/ONGOING ASPECT TO STRATEGY

1. Long term strategies
2. Think long term
3. What are sustainable programs that add value to our community, or culture?
4. Strategies to fulfill the short and long term goals

OTHER

1. How this initiative relates to other institutional structures and initiatives: status of the artist, funding to the Arts Board, lottery funding and cultural policy
2. Bringing existing bands, artists together to review the future of music in Sask.
3. How to put into practice all of the great ideas
4. Detailing how to implement ideas
5. Teach them to fish, don't give them fish

Appendix C

At several points during the discussions, participants highlighted existing models related to industry development. These are listed below for further research consideration.

- Manitoba Music Export Strategy
- Manitoba Film and Sound model of integrating the industries
- Making the case for economic value of the industry: Economic impact studies in Manitoba and Yukon
- Ireland Model for art income tax breaks
- CKUA Model for community radio
- Manitoba Liquor Laws for social liquor permits
- Town of Forget model for rural venues
- OSAC model for organizing tours
- Film industry tax model

Saskatchewan Music Industry Review
Stakeholder Consultation

Phase I: Individual Interviews
By Legislative Secretary Crofford

Participant Feedback

Prepared for:
Joanne Crofford, Legislative Secretary
and
Saskatchewan Culture, Youth and Recreation

Submitted by:
Do Process Facilitation Services
Susan Nurse and Valda Dohlen

November 27, 2006

Introduction

In May 2006, Premier Lorne Calvert appointed MLA Joanne Crofford as Legislative Secretary of the Music Industry Review.

Phase I of this review began with eight facilitated small group discussions with Saskatchewan based music industry leaders. See the report "Saskatchewan Music Industry Review - Stakeholder Consultation. Phase I: Small Group Discussions Participant Feedback and Summary Themes". November 15, 2006.

The data from the eight facilitated discussion groups is complemented by ten interviews personally conducted by Legislative Secretary Crofford:

- four individuals who were unable to attend the facilitated session in Prince Albert met with her as a small group;
- five stakeholders spoke with her in individual interviews on the SaskMusic Charter bus returning from the Western Canada Music Awards in Winnipeg, Manitoba; and
- one individual was interviewed to gain the perspective of a major talent buyer.

Ms. Crofford conducted her interviews using the small group discussion guide. This allows for a comparison of results according to the themes which emerged during the eight facilitated groups.

Like the small group discussions, the purpose of these interviews was to explore the state of the music industry and what is important to stakeholders for its future development, particularly given the major music events coming to Saskatchewan in 2007. Combined with the results of the small group discussions, these interviews will inform interim recommendations which Legislative Secretary Crofford will present to the Minister of Culture, Youth and Recreation (CYR) in November 2006. As well, the information will inform the design of research instruments to be used in the next phase of the examination.

The following report summarizes the data collected through Legislative Secretary Crofford's interviews.

Results

QUESTION #1: ***What's Working Well?***

All four themes which emerged in the small group discussions regarding what's working well in the province were echoed in the individual interviews. Specific comments of note are listed under each theme.

1. **An abundance of creative talent in the province and the lack of professional support for those in the industry.**
   - Lots of freelance talent working with national artists
   - We have lots of talent
   - It's hard to move to the next level. You need a third party to validate your musical "credibility" - career advice is important
   - Lack of support for a song writing career: entertainment lawyers, copyright, alternate media placement, use by other artists, industry awareness
   - There is interest among young people to develop careers within the professional side of the industry

2. **The importance of live performance opportunities and the lack of venues in the province.**
   - Music is starting to come around again, but there are not enough venues
   - Casinos have helped provide venues
   - Mandate Casinos to increase Saskatchewan talent

3. **The positive role SaskMusic and other NGO's play in supporting and developing the careers of local artists, through workshops, career advice, industry contacts, industry information, performance opportunities, and local chapters.**
   - The following organizations were named: Saskatoon Musicians Association, Prince Albert Musicians Union, Organization of Saskatchewan Arts Councils, SAC, SaskMusic Festival Association, SaskMusic, Saskatchewan Country Music Association,
   - SCMA local chapters are particularly effective at promoting music at a local level.
   - More funding for SaskMusic
   - Establish SaskMusic Saskatoon office

4. **Good artist collaboration in the province**
   - Creative side is working well, with emerging artists helping each other out.

Additional Comments

- there is an increased awareness of Saskatchewan music within the larger industry
- the 2007 shows will provide important networking and readiness opportunities
- Today, musicians are caught are in a vicious circle – can't make enough income by touring, so they need to get another job to live, which makes it difficult to tour.
- We need incentives for Casinos to hire original bands, not cover bands.

QUESTION #2: ***Music Events of 2007***

All three themes which emerged in the small group discussions on the music events of 2007 were echoed in the individual interviews. Specific comments of note are listed under each theme.

1. Showcasing

Like participants in the small group discussions, interviewees recognized that the musical events taking place in 2007 will provide important opportunities to showcase Saskatchewan talent and ultimately build industry momentum in the province. Comments included:

- the importance of profiling Saskatchewan artists through the local media, local venues and the internet
- the need to showcase youth, as well as bands which have already distinguished themselves within the industry.
- the importance of showcasing in smaller communities

Consistent with the small group discussions, interviewees also noted a concern over the lack of showcase venues. Specific ideas to address this concern included:

- using schools for small showcases
- increasing Saskatchewan content in casino shows and
- expanding community radio.

2. Promotion and Marketing

Like participants in the small group discussions, interviewees recognized the need to actively publicize the events of 2007 and the role of local talent in those events. Many identified a need to maximize media coverage in all formats, including TV, radio, print and the internet. Specific ideas included:

- hiring a professional publicist
- establishing a Saskatchewan "brand" for the events
- developing grassroots promotional strategies
- using existing festivals
- designing tourism packages
- running local competitions
- profiling Indie music and
- utilizing local personalities and "young hot bands".

Like the small group discussions, interviewees also mentioned the importance of ensuring local artists are aware of the opportunities the events of 2007 will offer. Interviewees also mentioned the need for a Youth Trade Show and ensuring there are known locations for Saskatchewan merchandise, including online sales links.

3. Readiness

Like participants in the small group discussions, interviewees expressed concerns about Saskatchewan performers' ability or readiness to take advantage of the opportunities that will present during the events in 2007. They identified the need to fund workshops or other educational sessions on:

- preparing for and promoting a showcase
- networking
- how to "pitch"
- "Meet the Agent"
- Know your equipment: what to buy and production

Like small group participants, interviewees also noted the need to equip artists with the skills, knowledge, technology and support they need to make the best of these events.

Additional Comments

Similar to the small group discussions, at least one interviewee qualified support for the music events of 2007. Specifically the need to ensure adequate sponsorship of existing events after the major shows of 2007 are over was mentioned.

QUESTION #3: *Impact of Technology*

Both of the themes which emerged in the small group discussions regarding technology were echoed in the individual interviews. Specific comments of note are listed under each theme.

1. **The impact of technology on the production of music**
   - Technology "dead ends" earlier technology and leaves recorded material stranded
   - Musicians are being replaced with recorded tracks
   - Instruments are now being made that do directly into the computer
   - Need for small-scale technology loans for equipment purchase
2. **The impact of technology on marketing and promotion of music**
   - The new global marketplace allows artists to sell directly to fans
   - Technology enables starting musicians to be heard
   - The ability to better access niche radio stations
   - Importance of email for business flexibility
   - Internet is an important research resource

Additional Comments

Additionally, copyright issues were mentioned - specifically the difficulty in meeting copyright standards with increased rules and bureaucracy.

QUESTION #4: ***Impact of Taxation***

All four themes which emerged in the small group discussions on taxation and incentives were echoed in the individual interviews. Specific comments of note are listed under each theme.

1. **Live music incentives to:**
   - Increase small communities' capacity for live music
   - Increase Saskatchewan talent in venues
   - Produce quality productions

Specific ideas:
   - Tax rebate for items purchased for festivals, such as backline, stage and sound.
   - Double the budgets of small town music events and festivals
   - Offer incentives or mandate casinos to maintain a Saskatchewan talent ratio
   - Clinic for festivals

2. Artist incentives to:
   - Offset music education costs
   - Develop careers in small niches
   - Increase training opportunities with industry experts
   - Increase opportunities for collaboration
   - Expand music educational opportu..ities for youth
   - Offset marketing costs

Specific ideas:
   - Eliminate the PST on product sales associated with music lessons
   - Establish a songwriting centre – retreat environment with possible private sector sponsorship
   - Add "strings" to school band programs

3. **Industry development incentives to:**
   - Increase training and mentoring opportunities
   - Increase corporate or private investment
   - Address professional gaps
   - Encourage collaboration with film industry
   - Establish a regional identity or brand

Specific idea:
   - Hire highly skilled and recognized people to stay and teach here
   - Tax credit for private investment – "donor system" or university tax credit model
   - Mentorship with senior cultural industry people
   - Partnership of SaskFilm and SaskMusic to provide a matching service
   - "Angel" investors - $50,000 to $100,000
   - Increase funding for critical SaskMusic educational activities
   - Require Sask. Lotteries to target Saskatchewan talent
   - Increase SaskMusic funding

4. **Promotional incentives to:**
   - Raise the profile of Saskatchewan talent
   - Support publicly funded arts facilities

Specific ideas include:
   - Establish a group presence at international venues and events

QUESTION #5: ***Envisioning the Future of the Industry***

All eight themes which emerged in the small group discussions on visioning were echoed in the individual interviews. Specific comments of note are listed under each theme.

1. **Saskatchewan people appreciate Saskatchewan music**
   - Music will be more "socially acceptable"
   - Local radio will provide more support to the music community. Artist profiles will be on the radio and T.V.
   - Music will get out to local communities (beyond major cities)
   - There will be more support for small festivals which are critical for audience and performance development
   - We will come out of the year (2007) with people knowing we have a music industry just like we have film and agriculture

2. **Saskatchewan is home to a thriving music scene**
   - Regina will have a greater sense of a music community (e.g. Arts Action)
   - Saskatchewan will have a reputation for music with stars - award winners are national and international artists attracting attention to our quality of music
   - Our talent and locations will be showcased like the movie industry does and like Manitoba does at Austin
   - We will have a strong, honest, talented industry base that is growing "all the time"
   - There will be a distinct image for Saskatchewan music – a Saskatchewan brand
   - Saskatchewan will be a notable "music centre" (Banff centre a possible model)
   - Musicians will be used as ambassadors more
   - There will be music everywhere, venues everywhere
   - Artists will move back from Calgary, Toronto, Alberta
   - There will be creative economies, sustainable quality of life, cultural spaces both public and private, other cultural industries are strong and mutually reinforcing

3. **Collaboration and cooperation are hallmarks of the industry**
   - There will be multi-disciplinary collaboration built on our cooperative history
   - Cross over opportunities with film will continue to grow

4. **Saskatchewan is home to many live performance venues**
   - There will be more support for development of venues, places to play live music every night of the week – there will be a lasting live music market in Saskatchewan – live music in bars, halls, kitchen parties, sporting events, small festivals etc.
   - There will be more touring
   - Venues will have the resources to upgrade their facilities for music
   - Music will be affordable in Rural Saskatchewan

5. Saskatchewan's schools engage youth in all aspects of music
   - There will be more music classes in schools - elementary and high school

6. **Saskatchewan has a strong professional infrastructure**
    - Industry will have a set work plan - here is what we are going to do
    - There will be 3 or 4 well-established labels
    - There will be 3 or 4 really good managers
    - The industry will take a page out of business and use call centres
    - Saskatchewan will have a well developed music infrastructure in small communities throughout the province. (Sliding scale support to small communities)
    - People will have access to "their" markets around the world

7. **Saskatchewan is home to world-renowned training**
    - There will be high quality "name" musicians teaching and collaborating

8. **The Government of Saskatchewan is recognized for its support of the music industry**
    - There will be money and investment in the education of music industry professionals, including apprenticeship and mentorship

Final Round: *Greatest Impact in the Short Term*

When discussing what one action government could take in the short term, interviewees identified the following:

- Focus on models that keep money in small communities and help to develop those communities from within. The Saskatchewan Orchestral Association and the Blues Festival were noted as successful models for this approach.
- Focus on improving music education programs within small communities so that everyone has access, not just those in the large centres.
- Enable local communities to be a part of the Juno's by showcasing local talent with Juno acts.
- Provide support at the export level – help to foster larger audiences and profile Saskatchewan music.
- Establish incentives for investment in the music industry.

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